Advanced Gift Planning: Major and Special Gifts

Day One

8:00 EST **Registration and Continental Breakfast**

8:30 EST **Session 1 – Gift Planning in Changing Times—The Wholistic Approach**

It is vital that those engaged in nonprofit fund development understand the interaction of a variety of factors that determine not only who will make charitable gifts but why they will make them. Learn why economic recovery, rapid changes in the makeup of the U.S. donor population and changing tax incentives will combine to have a major impact on the ways gifts are structured and why donors and advisors will increasingly turn to gifts that feature both current and future benefits. Learn how to meet these challenges using a wholistic approach to gift planning.

9:45 EST **Session 2 – Unlimited Potential of Noncash Gifts**

The larger a gift, the more likely it is to be made in a form other than cash. Learn why in some years, for example, gifts of appreciated securities have amounted to more than the value of all bequests received by America's nonprofits. Given recent investment market performance and the stabilization of real estate values, more donors are choosing to make their gifts using these and other assets. This session will explore the types of assets donors own, how to encourage larger noncash gifts and the additional tax motivations these gifts offer.

11:00 EST **Session 3 – Tax Matters**

Tax savings are among the least important of the motivations that lead donors to make major gifts—whether current or deferred. Donors receive the same tax benefits regardless of the charitable recipient. Overemphasis on tax incentives can be a mistake when cultivating donors. On the other hand, not understanding the important role of tax considerations when structuring a gift can lead to the loss of gifts. This session will introduce the basics of income, estate and gift taxes and how careful planning can help donors increase the size of their gifts. We include a summary of proposed tax law changes.

12:00 **Lunch on Your Own**

1:30 EST **Session 4 – Generational Giving**

Donors of different generations give differently. Learn how the creative use of gift planning vehicles can result in significant gifts from Boomers to be received during a practical period of time and help seniors maintain financial security for themselves and their loved ones.

2:45 EST **Session 5 – Basic Gift Planning Options**

Experienced fundraisers know that when asked for a large gift or when thanked for one of relatively modest size, donors will often express a desire to make the asked-for gift or to give more than they have just given but will express concern about their need to first meet important financial goals. Learn how to recognize these concerns and how time-tested planning tools can make it possible for donors to make gifts that blend their need to fund retirement, provide for loved ones and other personal planning needs with their desire to make meaningful charitable gifts.

4:00 EST **Session 6 – Ethical Standards and Considerations**

When dealing with older donors, a variety of issues can come into play and derail the gift planning process. Consider the potential impact of diminished capacity, dementia, Alzheimer’s, undue influence, unauthorized practice of law, etc. This session will offer case studies to discuss.

5:00 EST **Questions & Answers**

Day Two

8:00 EST **Continental Breakfast**

8:30 EST **Session 7 – Advanced Gift Planning Options**

A number of gift plans feature the immediate transfers of assets, subject to income or other benefits donors retain for themselves or loved ones for life or another period of time. This session features an introduction to gift annuities, charitable remainder trusts, remainders of real estate, charitable lead trusts and other tools that are increasingly useful in planning larger gifts. Learn why a number of these plans are now growing in popularity and the profiles of those who give in this way.

9:45 EST **Session 8 – The Role of Planned and Blended Gifts in Capital Campaigns**

What is the role of planned gifts in capital campaigns today? How should bequests, trusts and other deferred gifts be counted toward goals? Learn how to encourage gifts that are appropriate to the wealth level and life stage of donors in the context of a comprehensive campaign. Examine alternative approaches to valuing planned gifts and examples of excellent gift plans that can generate revenue within the time frame of a campaign.

11:00 EST **Session 9 – Storytelling and Marketing Special Gifts**

Charitable entities are increasingly informing their donors about the benefits of planned gifts. These efforts are too often conducted in a one-size-fits-all manner. This session will focus on how to tell your story to resonate with donors. In addition, the session will highlight the proper mix of mail, personal contact, the internet and other media to break through with appropriate messages to different constituencies based on their age, wealth, donative intent and other relevant factors.

12:00 EST **Lunch on Your Own**

1:30 EST **Session 10 –Case Studies on Donor Stories**

We will present real-world examples of the power of sharing your donors' stories in your communications.

2:45 EST **Session 11 – Where Do We Go From Here?**

This session will pull the seminar's discussions together and help you assess your next steps and create your plan. We will also examine team dynamics to help you build on your individual and collective strengths and address opportunities over time.

3:45 EST **Questions & Answers**

4:00 EST **Conclusion**

Hotel Pricing Information

Advanced Gift Planning (Washington DC) March 8-9, 2023

If you need hotel accommodations, please call the Hilton Alexandria Old Town reservations office at 800.445.8667. We have negotiated a group rate of $219 per night, which will be in effect through February 5, 2023, subject to availability. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.

Advanced Gift Planning (Chicago) – April 3-4, 2023

If you need hotel accommodations, please call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of $179 per night, which will be in effect through March 3, 2023, subject to availability. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.

Advanced Gift Planning (Washington DC) July 11-12, 2023

If you need hotel accommodations, please call the Hilton Alexandria Old Town reservations office at 800.445.8667. We have negotiated a group rate of $179 per night, which will be in effect through June 10, 2023, subject to availability. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.

Advanced Gift Planning (Chicago) – November 15-16, 2023

If you need hotel accommodations, please call the Courtyard Chicago Downtown Magnificent Mile reservations office at 312.573.0800. We have negotiated a group rate of $149 per night, which will be in effect through October 15, 2023, subject to availability. Please be aware that if the reserved block of rooms sells out before this date, your rate may be higher. Also, parking charges may apply on the hotel premises.